Drew Williams

Calgary, AB (Relocation-ready to Edmonton) · 403-618-6113 ·

bdrewwilliams@gmail.com

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linkedin.com/in/drew-williams-ai-strategy

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itfrombit.ca

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prairiesignal.ca

Education

Haskayne School of Business, University of Calgary — B.Comm (Finance), with distinction

Graduated 2025

GPA 3.9/4.0 — last 90 units

Haskayne Resilience Scholarship

Professional Summary

Performance analytics professional with institutional-grade reporting experience. Built attribution dashboards, benchmark comparisons, and memo-first reporting for investment committees. Experienced reconciling data across custodians, enforcing controls, and presenting insights to senior stakeholders. Led a compliance/ops integration that reduced vendor spend by

$120K annually

while improving cadence.

— Targeting

Performance Measurement Analyst

at

AIMCo

(institutional reporting; attribution analysis).

Core Skills & Tools

Performance Measurement:

attribution, benchmark construction, variance narratives, risk-adjusted metrics.

Data Quality & Controls:

reconciliation workflows, audit trails, documentation discipline, policy adherence.

Analytics Stack:

Excel (advanced), Python, SQL, Power BI/Tableau; memo-first reporting packages.

Process Improvement:

automation of recurring deliverables, KPI frameworks, SLA tracking.

Stakeholder Communication:

CIO/IC briefings, executive-ready storytelling, cross-functional collaboration.

Experience

Independent Builder — AI & Financial Software

Calgary, AB · 2023–Present

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Created performance measurement suite consolidating returns, benchmarks, and attribution drivers; automated variance narratives for CIO audiences.

Implemented Python/SQL workflows to reconcile data sources, flag anomalies, and maintain controls across reporting cycles.

Produced quarterly packs for asset owners detailing risk-adjusted performance, KPI trends, and recommended follow-ups.

Rosen Capital Advisors — Financial Analyst

Los Angeles, CA · 2016–2020

Maintained P&L/VaR dashboards integrating market and operational data; delivered attribution insights to partners and risk committees.

Led compliance/operations platform integration reducing vendor spend by

$120K/year

and strengthening reporting cadence and controls.

Delivered IC-ready narratives summarizing performance drivers, scenario analysis, and mitigation plans.

Private Equity (Summer Analyst) — Olson Cross & Alamo

New York, NY · 2015

Produced investment memoranda highlighting manager performance, benchmarks, and risk factors for $350M–$3.5B transactions.

Additional Information

Experienced in institutional governance rhythms (monthly/quarterly close, partner reviews, compliance requirements).

Writing-first approach: concise one-pagers, decision memos, reconciled decks for leadership.

Other:

operating model alignment · SDLC familiarity · cloud & enterprise apps exposure.

ATS Keywords

Performance Measurement; Attribution; Benchmarks; Institutional Reporting; Data Quality; Controls; Excel; Python; SQL; Power BI; Tableau; KPI; Risk-Adjusted Metrics; Executive Communication; Edmonton; Hybrid.